

GUIDANCE DOCUMENT

This Guidance Document is drafted to provide instructions and guidelines as to how stakeholders will be able to prepare for a remote assessment, an ocular inspection or a blended procedure for their application of Domestic Bidders (DoBid) Certificate of Preference

June 2021

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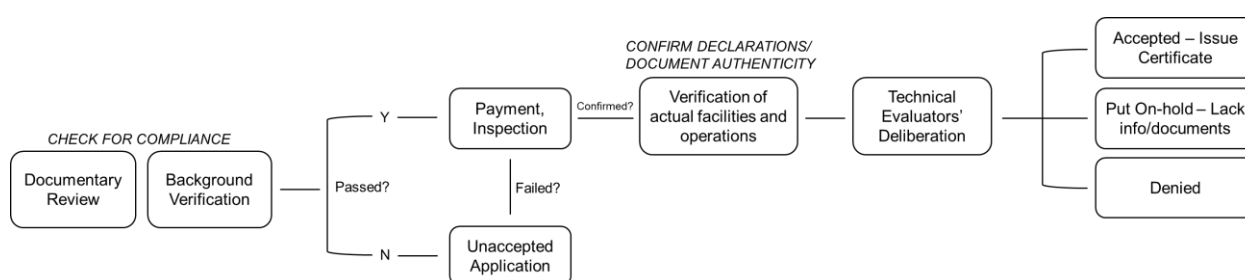
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RATIONALE

The Domestic Bidders (DoBid) Certificate of Preference is a document that provides domestic price advantage to its holders during bidding. The DoBid Certificate is guided by the following legal bases: Commonwealth Act 138, Republic Act 9184, and DTI Department Administrative Orders 19-01 and 19-10 series of 2019. The DoBid caters to all domestic bidders and is assessed per good.

One of the major assessment requirements of the Certificate is the conduct of an on-site visit to verify the origin of the goods sought to be certified. The visit will be on the site where the goods applied are grown, produced, or manufactured. With the changes in the quarantine status, limiting travels nationwide, there arose a need to provide specific guidelines on alternative procedures to conduct on-site visits to DoBid Applicants.

Flowchart of the Manufacturing Process Assessment



PROCESS GUIDELINES

Documentary Review. Before proceeding with the assessment process, DoBid applicants must submit complete documentary requirements. Identification permits must be up to date and should be sent in clear copies. Only authorized representatives must sign the application form.

Click here for the guide on how to fill up the DoBid application form: [Guide](#).

Background Verification. After the assigned Technical Evaluator has assessed that submitted documents are complete, background verification is internally done to ensure declarations as true and correct. Proven misleading/wrong information may lead to the unacceptance of the submitted DoBid application.

Payment, Inspection. Once the documents are complete and compliant, and the declarations were verified, the Secretariat will inform the applicant about the application fee and payment instructions. Scheduling and the conduct of inspection will be done afterwards.

Verification of Actual Facilities and Operations. To further verify that declarations are correct, an on-site assessment will be done to observe the actual facility and operations of the applicant. The procedure of manufacturing the applied good/s must be demonstrated as well as the machines and detailed steps should be discussed. The technical evaluators could ask questions during the assessment.

Meanwhile, original documents must be presented during the assessment for authentication.

Technical Evaluators' Deliberation. The lead technical evaluator will then collate all the findings and present analysis and recommendation to the evaluation team. After reviewing and deliberating the findings, the team will come up with a technical report with their recommendation of the DoBid

application under scrutiny. The Director has the final say on whether the DoBid application will be approved, denied, or put on hold.

OCULAR ASSESSMENT GUIDELINES

Three procedures could be done to accomplish the ocular assessment. The objective of this activity is to verify where the goods applied for certification are grown, produced, and/or manufactured. The guide in this section will help applicants prepare for the said assessment to minimize risks and errors throughout the activity.

Physical On-Site Visit

During the on-site visit, technical evaluators are toured around the declared facility of the applicant. The process of manufacturing the good/s applied must be demonstrated from raw materials to the finished actual good. The evaluators expect to see such but not limited to the following based on the documents initially submitted by the applicant:

- ✓ Machines, Tools, and Equipment
- ✓ Storage Facility
- ✓ Manpower (as the case may be)
- ✓ Raw Materials and packaging
- ✓ Finished Goods
- ✓ Original Identification Documents

Evaluators would also observe health protocols and/or good manufacturing practices in the site, manpower, announcement boards/production progress, and the like as evidence that a facility is indeed a grower, producer, or manufacturer. Photos may be taken during the visit.

Pre Assessment

The applicant has to ensure that there is an ongoing production or manufacturing of the good/s applied for certification. If this is not possible, the applicant might be asked to submit additional requirements to prove their actual capacity to manufacture.

Safety. The applicant has to ensure that the technical evaluators are safe throughout the whole visit. Provision of safety equipment such as helmets, gloves, safety glasses, Personal Protective Equipment (PPE), face masks, earphones, and the like must be prepared and provided.

Operational Machines and Procedures. At least a day before the visit, the applicant must ensure that all machines are operational for a proper demonstration. To avoid delays in the visit, troubleshooting the machines should be done prior.

Designated Personnel. The personnel who will be joining the inspection will have to be at the minimum be composed of: (1) Person who knows the production ins and outs as well as machines and raw materials; (2) Person who has experienced bidding as a representative of the company; (3) Point person of the DoBid application; (4) Person who manages the day-to-day operations, sales, and clients of the company.

Documents and Profile. Original and authenticated documents must be prepared beforehand to be shown to the technical evaluators. The company also has to prepare a presentation of who their company is, their products and services, and other related information.

Administrative Concerns. The applicant must coordinate closely with the Secretariat regarding the administrative matters of the visit. As stipulated in DTI DAO 19-01 Section 8 “Travelling expenses of evaluators for on-site visit outside Metro Manila will be shouldered by the applicant.”

During the Assessment

In order to achieve an efficient flow of assessment/visit, the following must be taken into account:

- ✓ The visit must focus on the manufacturing of the actual good/s alone. Presentation of the company’s other facilities/processes besides the good applied for certification is optional.
- ✓ Recording of the actual processes may be taken by the Secretariat
- ✓ One person would be guiding the technical evaluators, but other knowledgeable assisting company personnel may also answer questions from the evaluators.
- ✓ The physical assessment would have two (2) parts:
 - Actual Visit – an actual tour of the manufacturing facilities
 - Management Interview – applicant will have to present their company profile to the evaluators and be prepared for related questions

Remote Assessment

For the conduct of the remote assessment or virtual visit, certain things must be considered. The DoBid Secretariat must first evaluate the risks accompanying the conduct of the remote assessment compared to the conduct of either a physical visit or blended procedure.

Like the physical setup, the remote assessment would also look into the current operations and facilities of the company. With a limited view in an online setup, applicants must be familiar with the online platform that will be used.

A recorded video as an alternative to the whole remote assessment will not be allowed.

Pre Assessment

Unlike the physical inspection, a remote assessment would require longer and more things to prepare. This is to avoid possible technical difficulties during the virtual visit.

Internet Connection. Ensure a stable internet connection before the actual visit. Provision of alternative routers or other sources of internet connection is recommended.

Devices and Batteries. Ensure that devices are fully charged to avoid delays in the visit. A Powerbank or an alternative fully charged device must be prepared beforehand. The devices, on the other hand, could be a smartphone or a laptop whichever is easier to use for the applicants.

Knowledge of the Online Platform. The remote assessment will be done via MS Teams or as may be required by the Secretariat. The applicants must be familiar with the use of the preferred platform before the virtual visit. Control settings, audio, video, and other features must be explored by the applicant’s representatives already.

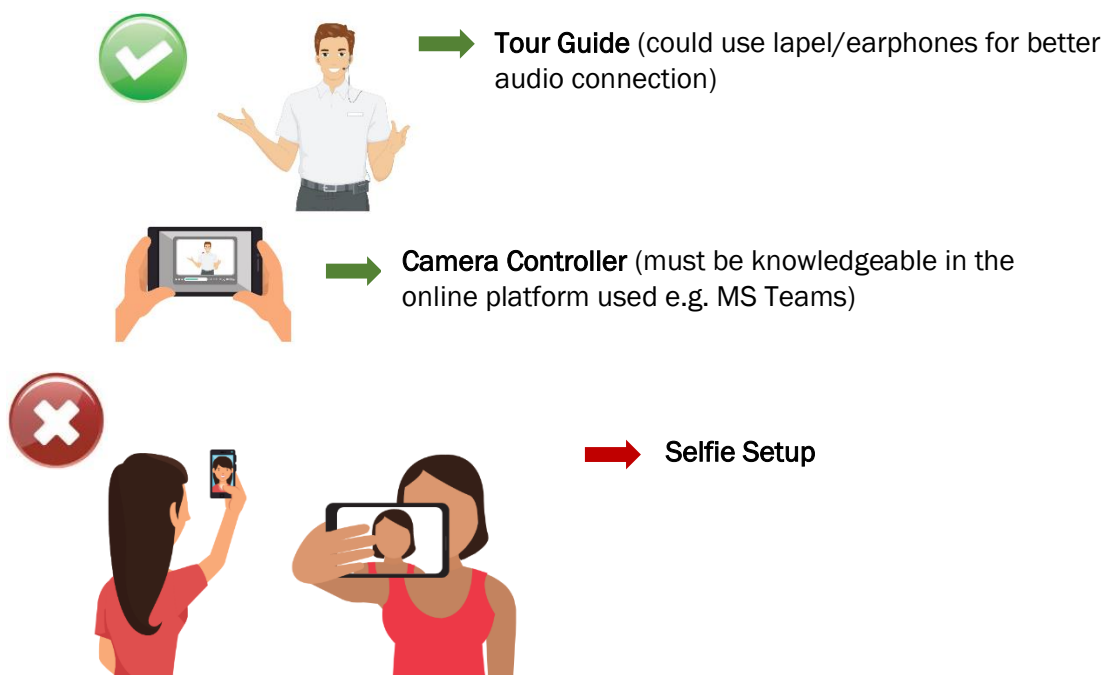
A separate guide in navigating MS Teams is included in this document.

Audio and Video. The video and audio of the devices must be clear. The use of wireless earphones is recommended.

During Assessment

In order to achieve an efficient flow of assessment/visit, the following must be taken into account:

Walkthrough. The required setup of the remote assessment must be: one person should hold the camera, panning the view, and the other person orienting the Secretariat through the steps and facilities.



The Secretariat may also instruct the tour guide or the camera controller should they want to view more of the facility, zoom in / zoom out of a material, focus on a certain step, and the like. Thus, an audio connection on the side of the applicant is crucial.

Supporting Personnel. To avoid delays in answering questions or inquiries raised by the Secretariat, separate personnel from another device connected inside the same online platform could narrate, address, and substantiate the information. It is better if this other person is connected to a different internet connection source and is located far from the tour guides to avoid audio feedback.

Required Views. The following should be shown during the virtual inspection:

1. Tour guide must start the inspection entering the facility (The entrance of the facility must be shown)
2. Area where identification documents such as Business Permit, CDA/BN/SEC, and other permits are displayed
3. Overview of the whole facility
4. Specific production areas in the facility where the manufacturing process is done (Cutting area, trimming area, molding area, QC, storage, and the like)
5. Raw Materials storage

6. Manpower and operational machines
7. Demonstration of the actual transformation of raw materials to finished goods

The Secretariat may also instruct the camera controller/tour guide to go to other areas of the facility.

Technical Reminders. For more efficient conduct of the inspection, the applicant must bear the following in mind:

1. Enter the waiting room/Virtual Lobby within 30 minutes of your scheduled time. Beyond this period means CANCELLATION of your inspection.
2. After the virtual inspection, there will be a management interview where experts/technical consultants from DTI and its partner agencies will be asking questions about the management processes and other related information.
3. The whole virtual inspection will be recorded.

Blended Procedure

Depending on the Secretariat's decision considering the risks, a blended procedure may be called upon which would entail a combination of a physical assessment and a virtual inspection. With this setup, DoBid Technical Evaluators or DTI Regional and/or Provincial offices will be visiting the facility and will conduct a normal physical inspection setup. Simultaneously, another set of technical evaluators will be observing virtually. As such, the applicant will be asked prior to the inspection to **assign an employee/personnel and prepare a device** where the virtual side of the inspection will be conducted. The assigned employee will be holding the device throughout the simultaneous inspections.

On the virtual setup, technical evaluators should be able to see through the entire visit. They may also ask questions and clarifications and should be answered by the applicant/company representatives immediately.

Unlike the virtual inspection setup alone, the role of the assigned personnel here would be to relay the comments/feedback of the virtual evaluators during the visit. The goal is to record what the technical evaluators saw during the physical visit.

The guidelines for both the physical and virtual setup as recorded above will still be applicable.

Reminders. The virtual counterpart will be recorded. MS Teams will still be the official platform for the visit. The Secretariat will provide the link.

Recommended Views:



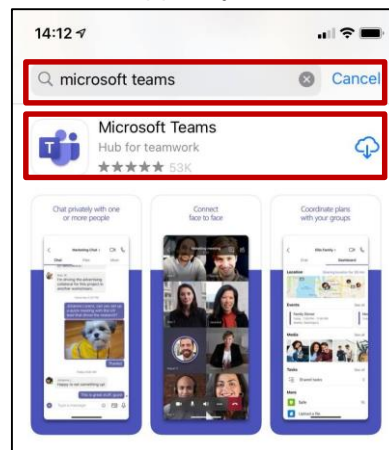
Navigating through MS Teams

This section provides you with a step-by-step procedure of how to navigate through the MS Teams using iOS device/phone, android phone, or laptop/browser.

Using an iOS device/phone

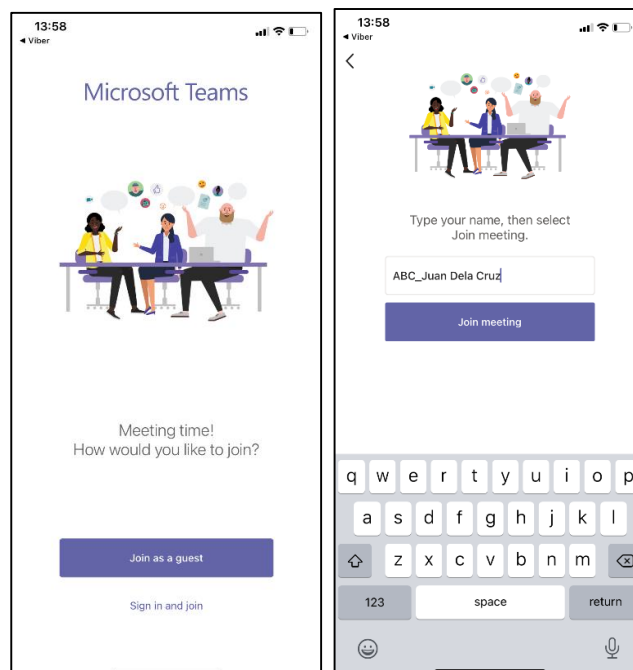


1. Open the Apple App Store on your iOS device.
2. Tap the Search icon in the store and type “Microsoft Teams”. Make sure you choose the Microsoft app, as shown below.
3. Tap the download button to install the app on your device.

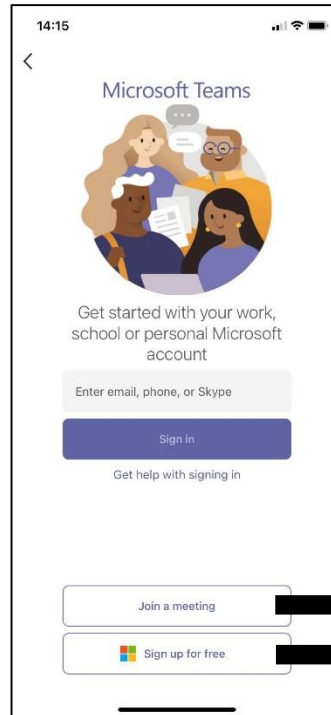


Once the app has finished downloading and installing, tap the Open button, sign in as a guest with the format: “Company_Whole name” or sign in to your new or existing account. You can sign up for free if you are a new user.

Join as a Guest:

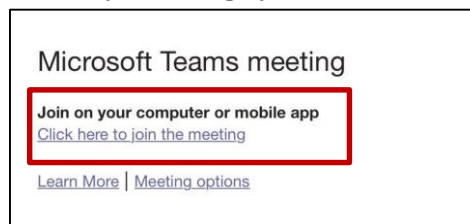


Sign in to your new or existing account:

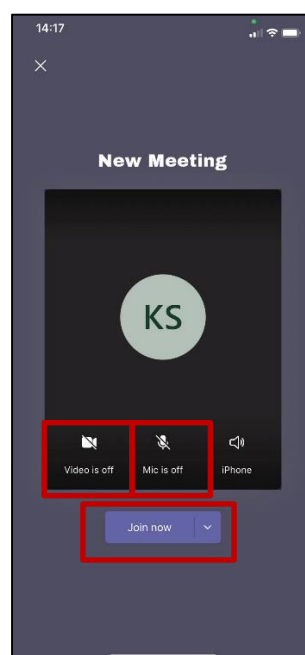


Sign in if you already have an account.
Sign up if you do not have an account yet. This is free.

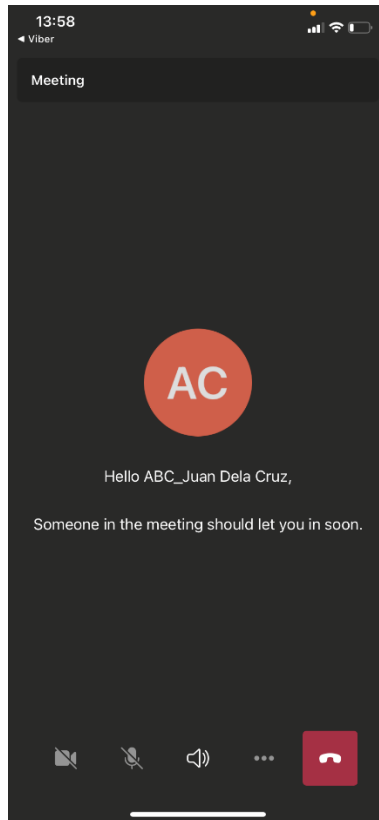
4. Access and click the link we sent you through your emails.



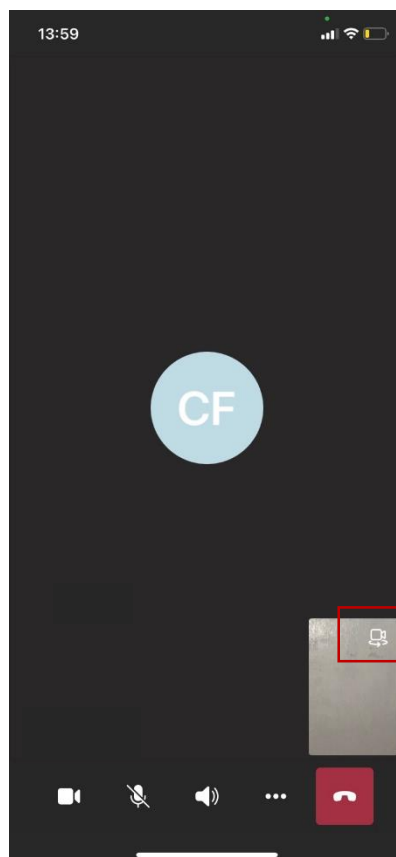
5. Click "Join now." Click 'video on' during inspection for the evaluators to see the whole inspection. Click 'mic on' for the evaluators to hear your explanations, etc.



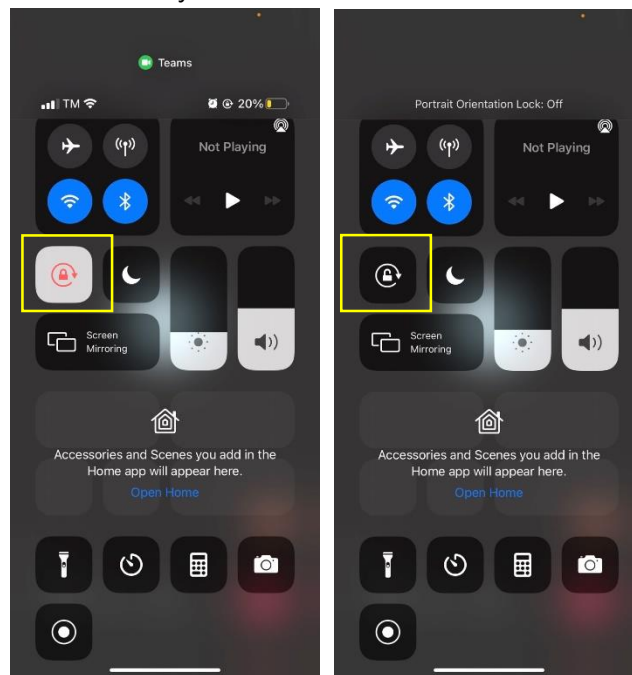
Once you are in, wait until the technical evaluators admit you to the virtual room.



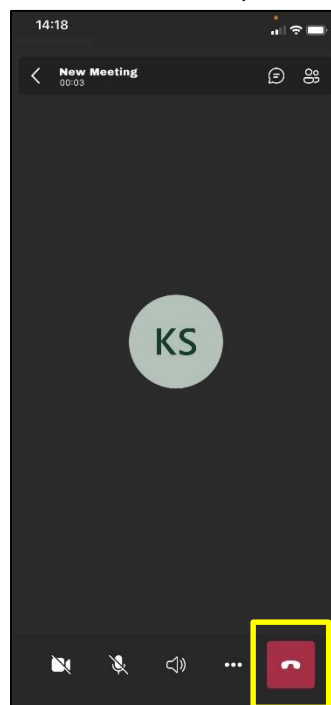
6. If you want to switch from front to back camera or vice versa, click the button as shown below:



7. If you want to change the view of your camera from a portrait to a landscape view, unclick the portrait orientation button in your notification center.



8. You may click the red hang-up button once the inspection is done.



Using an Android device/phone

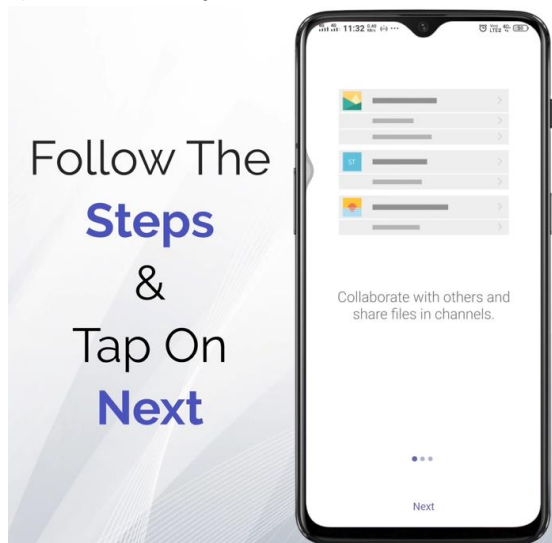
1. Download and install Microsoft Teams in Google Play Store.



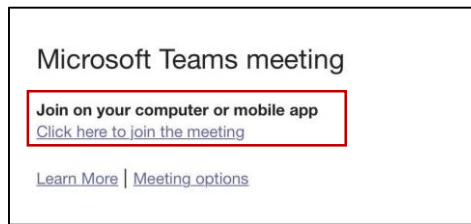
2. Open Microsoft Teams Application and sign in to your account. If you have an existing account, you may enter your email address and password. Otherwise, you can sign up for free if you are a new user.



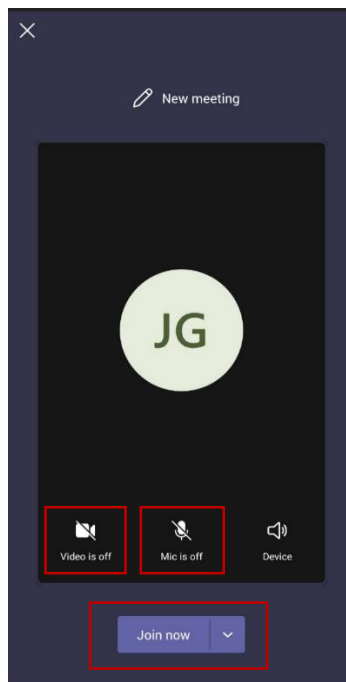
3. Follow the steps and tap on next until you see the button "Got it!"



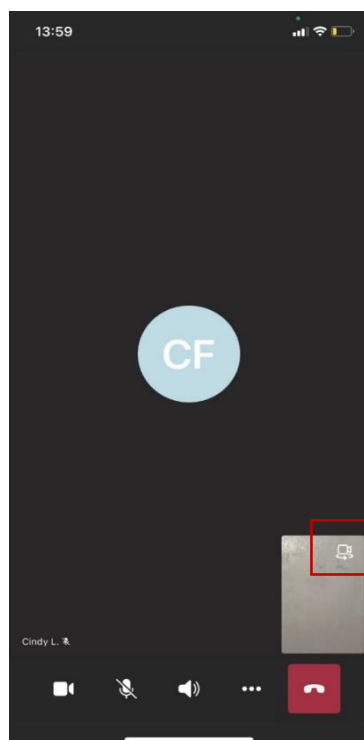
4. Access and click the link we sent you through your emails.



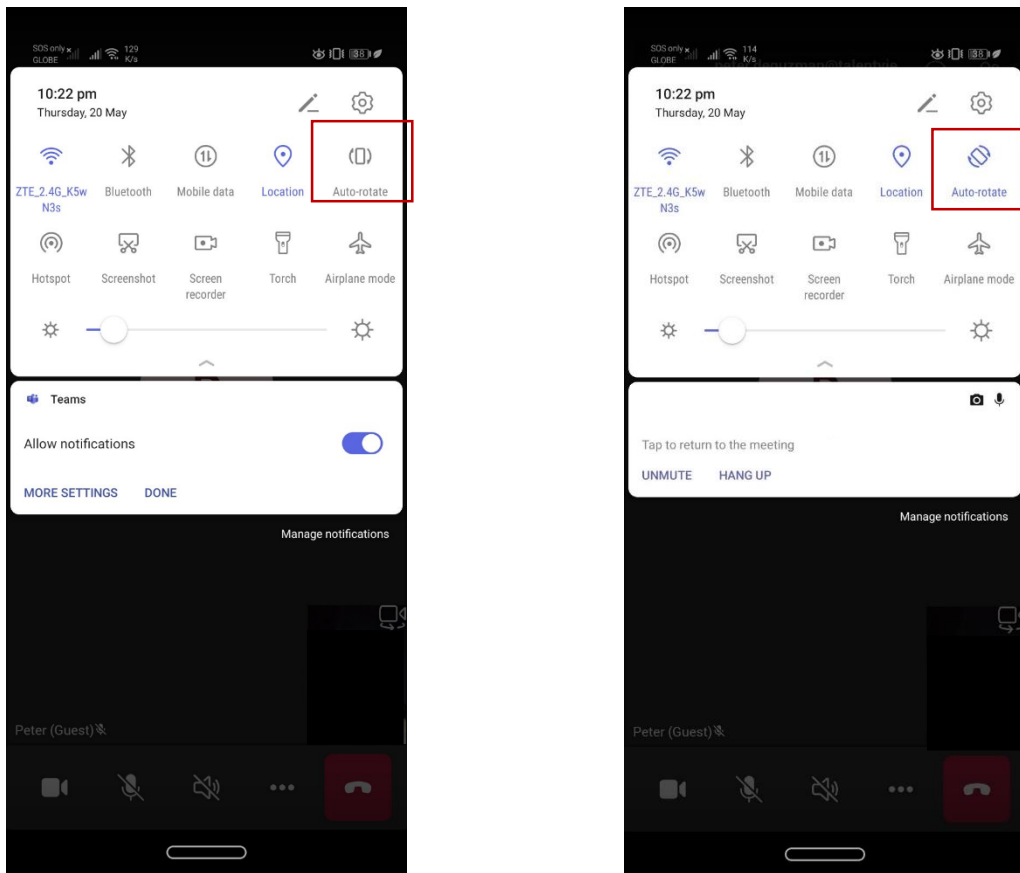
5. Click "join now." Click 'video on' during inspection for the evaluators to see the whole inspection. Click mic on for the evaluators to hear explanations, etc.



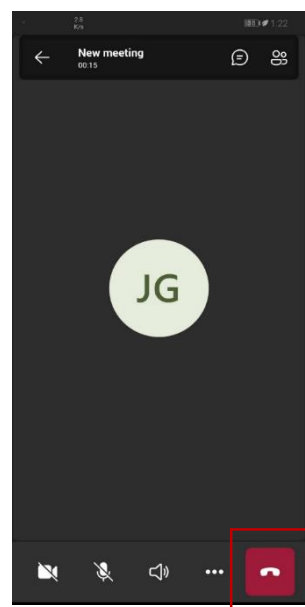
6. If you want to switch from front to back camera or vice versa, click the button as shown below:



7. If you want to change the view of your camera from a portrait to a landscape view, just go to your settings and click the auto-rotate or orientation button.

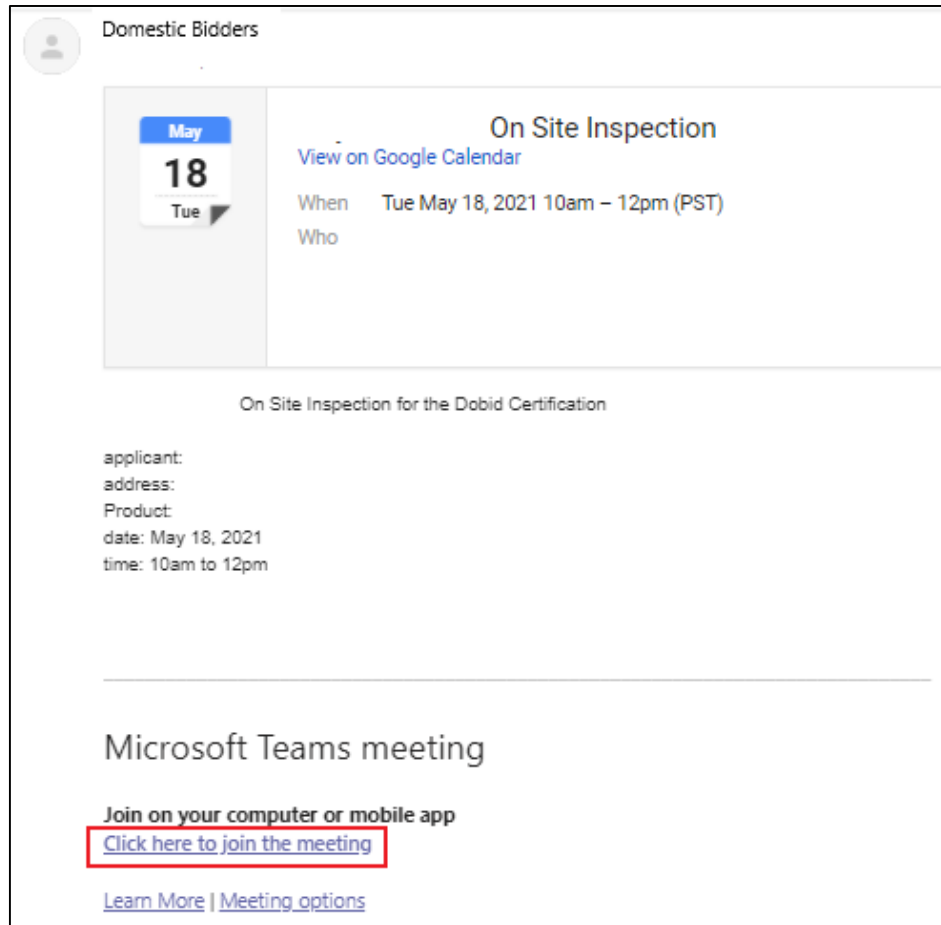


8. Once the inspection is done. Click the red hang-up button.

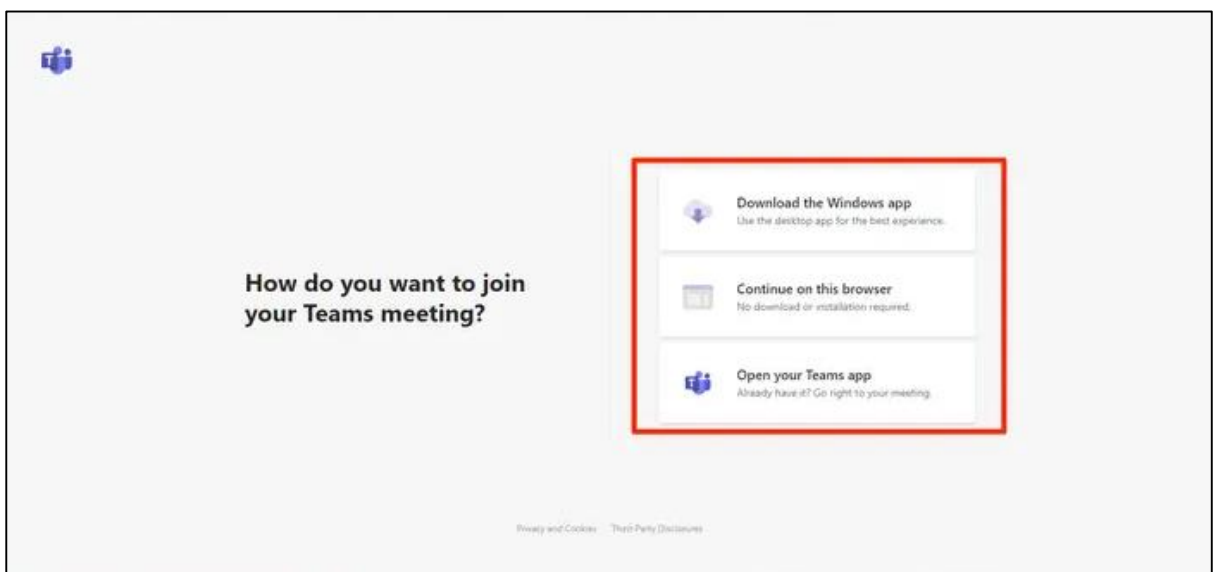


Using a laptop/browser

1. Go to your email and find the meeting invite. Click on the link that says “Click here to join the meeting.”

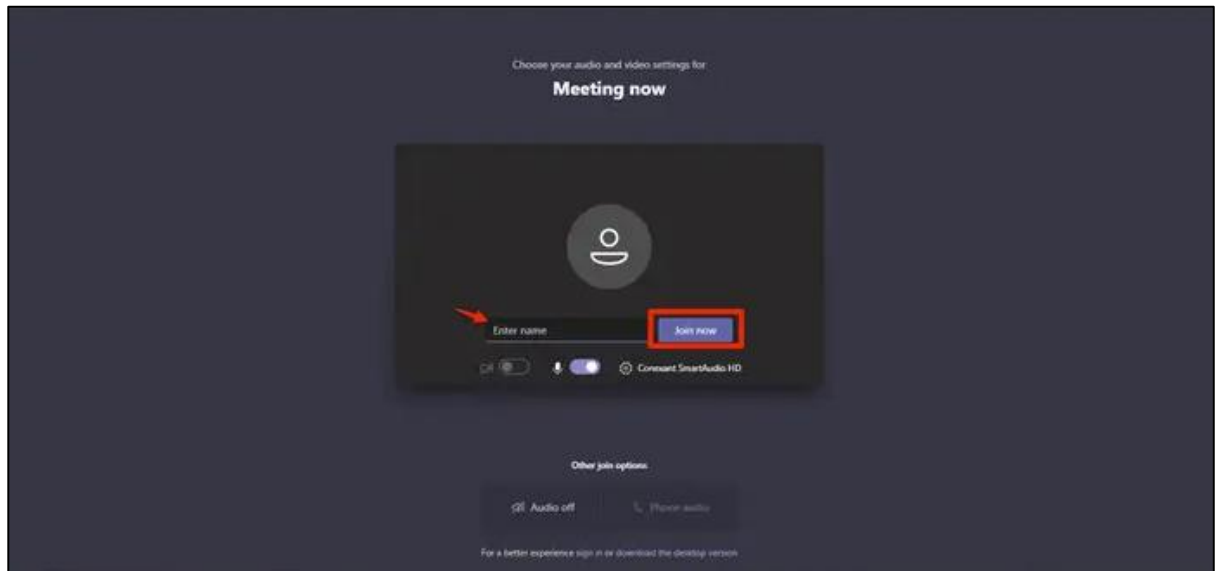


2. Choose whether you want to join via the browser, or join via the desktop app – or download it and join.



3. If you choose the desktop app, you may be prompted to sign in with your Teams account if you have not done so previously.

If you choose your browser, you will also have to enter your name to appear on the screen and select your camera and mic preferences. Once you do, click “Join now.”



4. Wait for the meeting host to admit you.

CAPACITY ASSESSMENT

One of the crucial data that is being looked into during inspections is the capacity of a company to manufacture/grow/produce certain goods. The Secretariat will be keen to request details from the applicant during the inspection.

In order to assess one's production capacity, specific information about machines and manpower should be disclosed to the technical evaluators.

Overall Capacity = Machines + Manpower

Note: A company's manufacturing capacity will only be measured according to the current machines and manpower shown during the inspection, excluding foreseen additional units or employees.

Increased Capacity = ↑ Machines + ↑ Manpower

In Determining the Capacity thru Machines

- Details about the Determinant Machines (DMs) or the machines directly involved in the production/manufacturing of the applied good/s
- Current and rated capacity of each machine in a certain specified duration (e.g. per day, per month, per hour, etc.)
- Level of automation / Necessity for manual operations for each machine
- Average age of machines
- Efficiency rate of machines (Breakdown rate, maintenance program)

Adding the capacity of each machine in a certain period of time would already provide a rough estimate as to how much the plant/facility can produce/manufacture. However, the level of automation/necessity for manual operations as well as manpower has to also be accounted for.

In Determining the Capacity thru Manpower

- No. of personnel in the operation/manufacturing side
- No. of hours/shift
- No. of shifts (regular operations) and maximum no. of shifts
- Operating Days per week

Depending on the particular activities required to manufacture a particular good, a company's manpower contributes to the overall output of a company. If activities are labor-intensive, manpower would greatly affect one's capacity. However, if the overall manufacturing processes are mostly automated, manpower will be at the minimum.